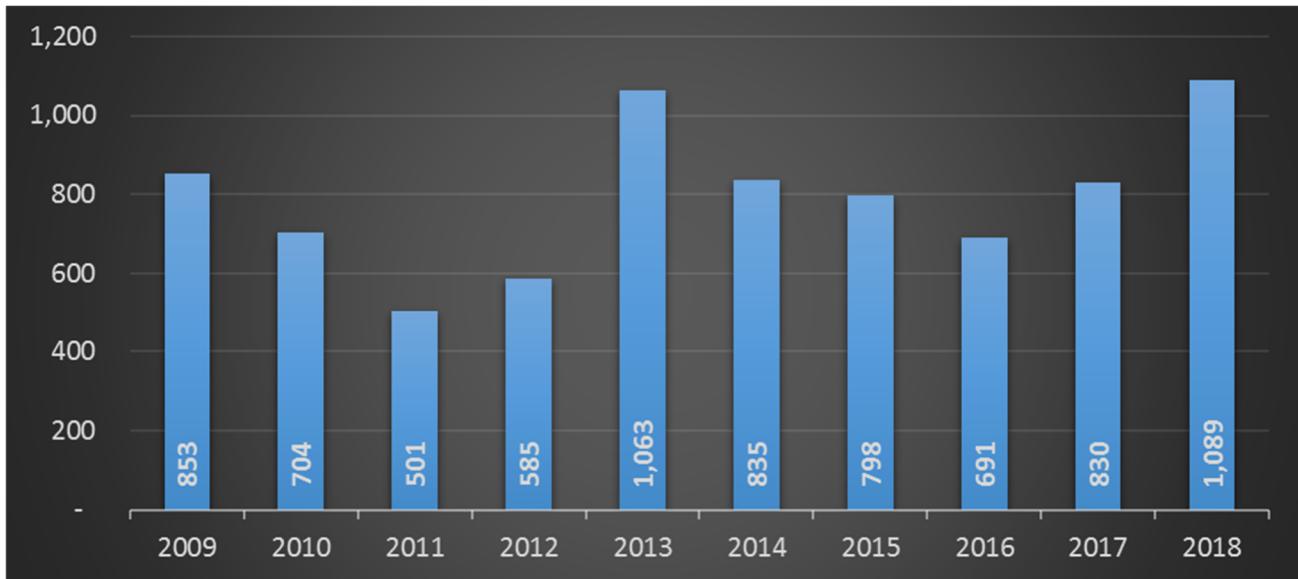


Therefore, it is assumed that the long term trend is for permits to stabilize at approximately 1,000 permits per year, which means that it is estimated that approximately 10,000 new permits will be issued in a 10-year period in the County.

Exhibit 7. 2009-2018 Residential Permits per Year in Unincorporated Pima County



*2018 permits based on annualized January to May data

The proportion of new permits in each service area was estimated based on historic permits, the estimated growth from the 2017-2022 TIP, and knowledge of planned and expected developments. The proposed residential growth for each service area is shown in Exhibit 8, along with the historic permit and PAG TIP data for reference.

Exhibit 8. Population and Housing Land Use Assumptions: 10-Year Growth

	HISTORIC PERMITS 01/15-05/18		PAG TIP 2017-22*		PROPOSED 10-YR GROWTH	
Service Area	Permits	% Permits	New HH	% New HH	Permits	% Permits
Central	10	0.4%	2,267	20%	900	9%
North	407	15%	1,776	16%	1,700	17%
Northeast	407	15%	485	4%	900	9%
Northwest	64	2%	524	5%	400	4%
South	210	8%	579	5%	600	6%
Southeast	862	32%	2,514	23%	2,900	29%
West	714	27%	2,943	27%	2,600	26%
TOTAL	2,674	100%	11,086	100%	10,000	100%

*TIP Households includes TAZs that are partially in the County even if most households are in City or other municipality

3.2. EMPLOYMENT GROWTH ASSUMPTIONS

3.2.1. PAG Transportation Improvement Program (TIP)

Employment projections are also important to estimate the amount of new infrastructure needed to serve planned new development at each service area. The PAG TIP data includes five-year (2017-2022) estimates of the number of employees for each Transportation Analysis Zone (TAZ) in the region. Exhibit 9 shows the TIP estimated employment growth for the proposed service areas.

Exhibit 9. TIP (2017-2022) Estimated Employment Growth

Service Area	New Jobs*	% New Jobs
Central	3,534	26%
North	4,294	32%
Northeast	1,245	9%
Northwest	512	4%
South	715	5%
Southeast	853	6%
West	2,465	18%
TOTAL	13,618	100%

*TIP Employment includes TAZs that are partially in the County even if most households are in City or other municipality

3.2.2. PAG Regional Mobility and Accessibility Plan (RMAP)

The Pima Association of Governments (PAG) updates its long-range *Regional Mobility and Accessibility Plan*⁴ (RMAP) every four years. The current RMAP was formally adopted by PAG's Regional Council on May 26, 2016 and identifies projects, goals, and performance measures for the transportation system of the Tucson metropolitan area over the next 30 years (2045). The RMAP includes information on existing (2018) number of jobs in unincorporated Pima County by sector, as shown in Exhibit 10.

Exhibit 10. Existing Jobs in Unincorporated Pima County (March 2018)

Sector	Industrial	Retail	Office	Total
Existing	19,771	9,774	53,328	82,873
% Existing Jobs	24%	12%	64%	100%

⁴ *Regional Mobility and Accessibility Plan* (RMAP). Pima Association of Governments.
<<https://www.pagregion.com/documents/rmap/rmap2045/2045RMAP.pdf>>

3.2.3. 10-Year Land Use Assumptions: Employment

Based on the 2017 third quarter forecast by the University of Arizona Economic and Business Research Center⁵ (EBRC), a 0.95% annual growth in jobs was estimated in unincorporated Pima County. The proposed employment growth is also consistent with the most recent EBRC forecast (May 2019) for the County as a whole of 0.9% per year from 2017-2022. Currently there are 82,873 existing jobs in unincorporated Pima County; therefore approximately 8,245 new jobs are expected in a 10-year period.

Three non-residential employment sectors are considered in this report: retail, office and industrial. Based on the 2017-2022 TIP employment growth, the existing distribution of jobs by sector, and discussions with the County concerning planned and expected development, the projected number of jobs for the region is shown in Exhibit 11.

Exhibit 11. Employment Land Use Assumptions: 10-Year Growth

	PAG TIP 2017-22*		PROPOSED 10-YR GROWTH		% Jobs by Land Use			Jobs by Land Use		
	Service Area	New Jobs	% Jobs	Jobs	% Jobs	Ind	Retail	Office	Ind	Retail
Central	3,534	26%	1,731	21%	63%	3%	34%	1,091	52	589
North	4,294	32%	1,731	21%	25%	15%	60%	433	260	1,039
Northeast	1,245	9%	907	11%	5%	13%	82%	45	118	744
Northwest	512	4%	247	3%	60%	3%	37%	148	7	92
South	715	5%	412	5%	30%	10%	60%	124	41	247
Southeast	853	6%	1,484	18%	30%	25%	45%	445	371	668
West	2,465	18%	1,731	21%	15%	14%	71%	260	242	1,229
TOTAL	13,618	100%	8,245	100%				2,546	1,092	4,607

*TIP Employment includes TAZs that are partially in the County even if most households are in City or other municipality

⁵University of Arizona Economic and Business Research Center <<https://ebr.eller.arizona.edu/>>

4. SUMMARY

This report provides 10-year growth projections for unincorporated Pima County for the purposes of the roadway impact fee study update. The estimated population and employment growth data for 2029 conditions is provided in Exhibit 12.

Exhibit 12. Residential and Employment Land Use Assumptions: 10-Year Growth

Service Area	Permits	Jobs by Land Use		
		Ind	Retail	Office
Central	900	1,091	52	589
North	1,700	433	260	1,039
Northeast	900	45	118	744
Northwest	400	148	7	92
South	600	124	41	247
Southeast	2,900	445	371	668
West	2,600	260	242	1,229
TOTAL	10,000	2,546	1,092	4,607

These assumed land assumptions will be used in the infrastructure improvements plan (IIP) to estimate the amount of new facilities needed to serve the projected new development. ARS §9-463.05 (D)(3) requires the land use assumptions to be updated at least every five years.

APPENDIX

- **List of Preparers**
- **January 2015 – May 2018 Permits**
- **2017-2022 TIP Population Growth Map by TAZ**
- **2017-2022 TIP Employment Growth by TAZ**

List of Preparers

Staff Participants

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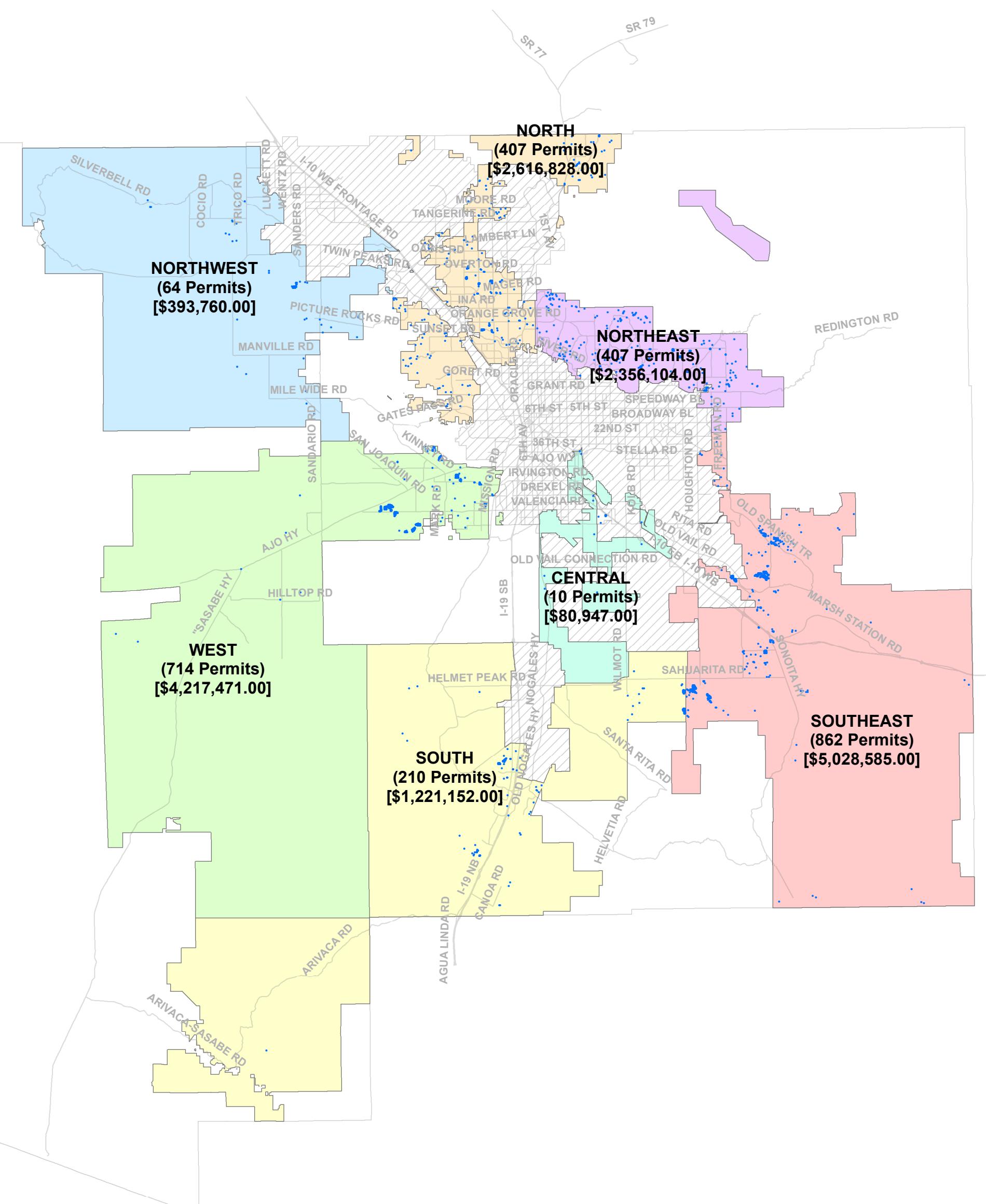
Yves Khawam, PhD, Assistant County Administrator for Public Works

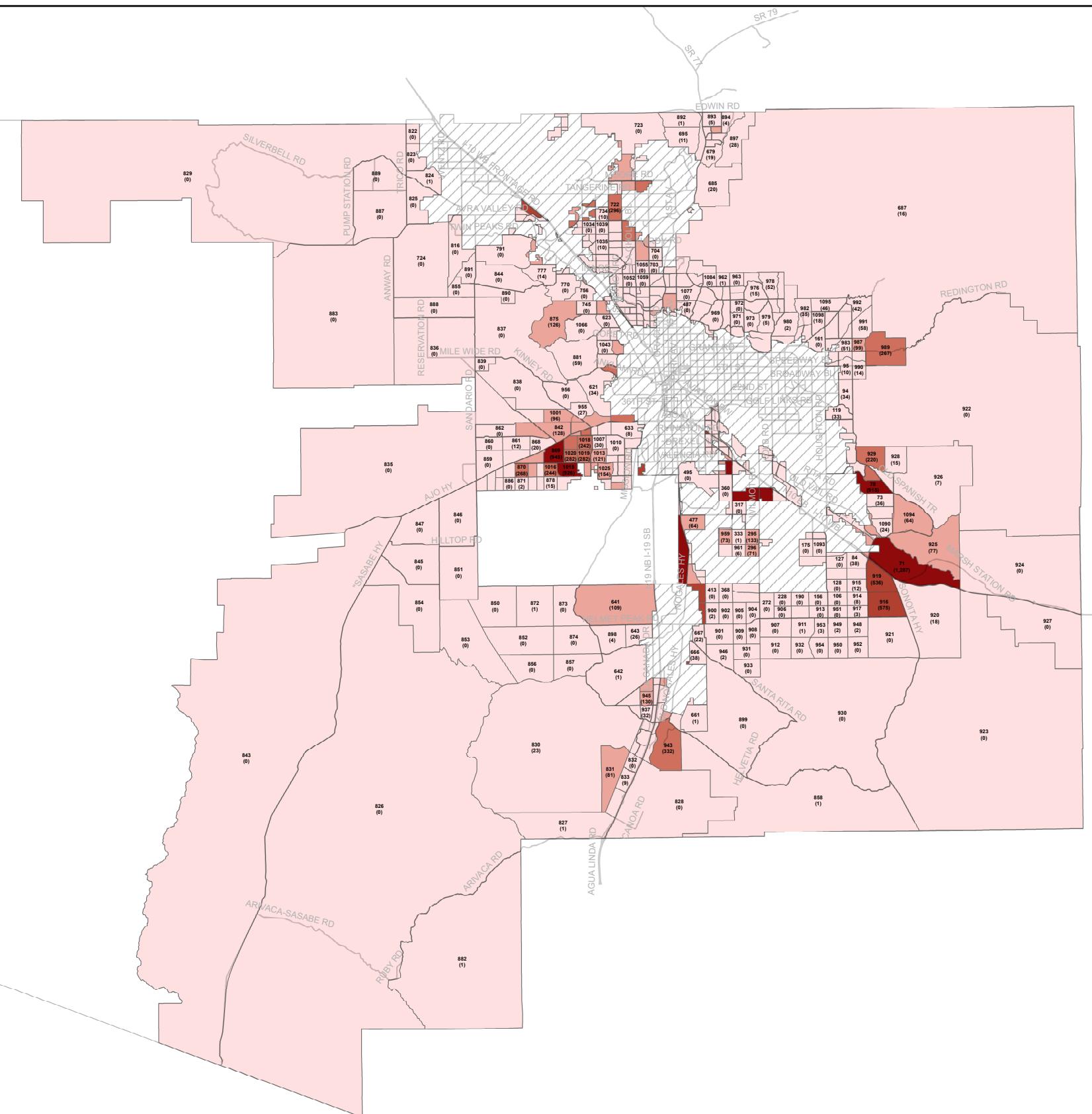
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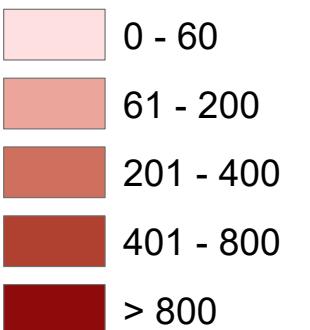


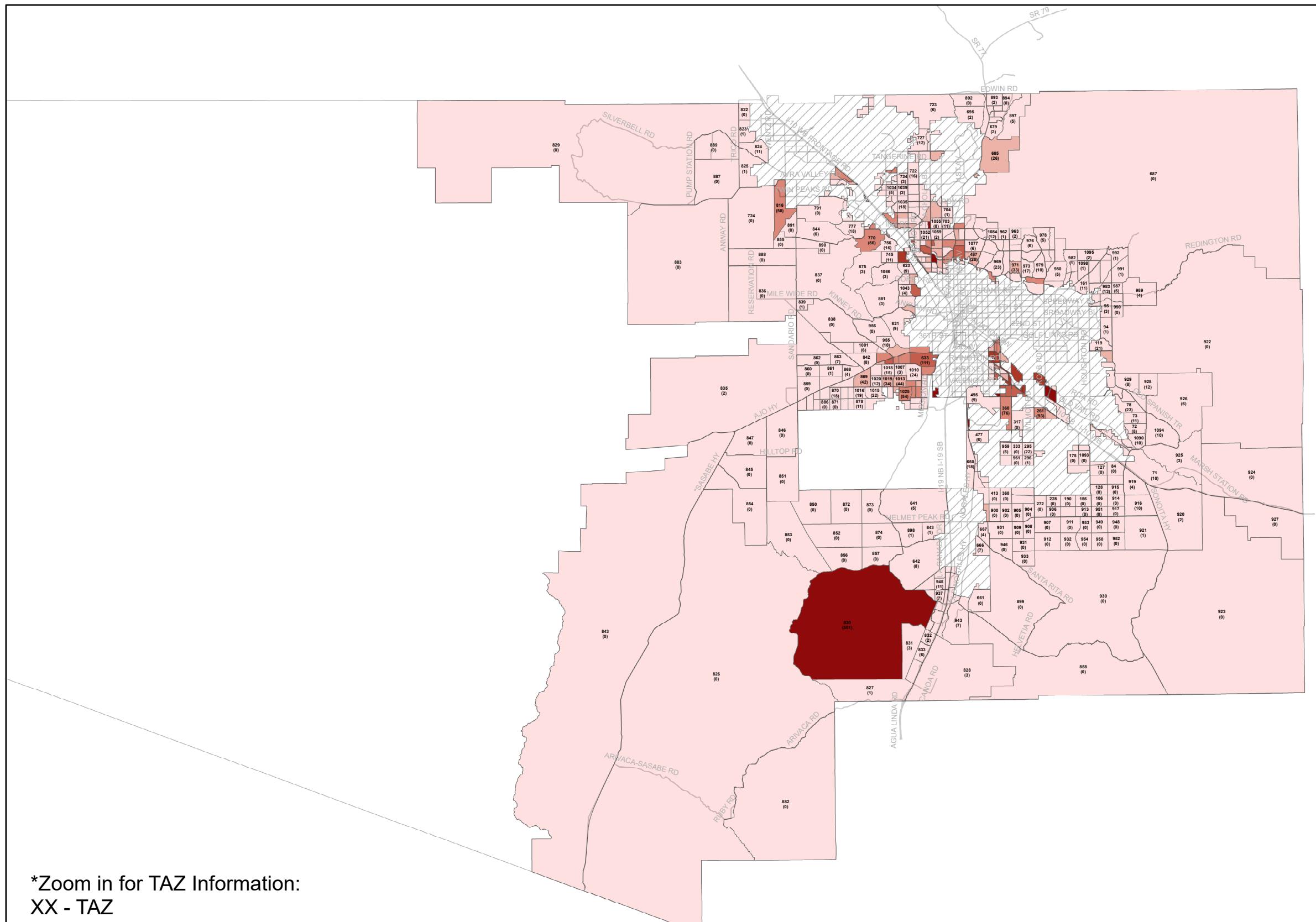


Legend

All TAZs

Population Growth 2017-2022



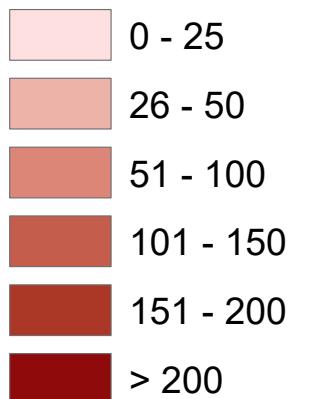


*Zoom in for TAZ Information:
XX - TAZ
(XX) - Employment

Legend

All TAZs

Employment Growth 2017-2022



Pima County Impact Fee Improvement Program 2017-2022 TIP Employment Growth by TAZ

PSOMAS

July 2019